

Job Aid: How to Create a Change Order

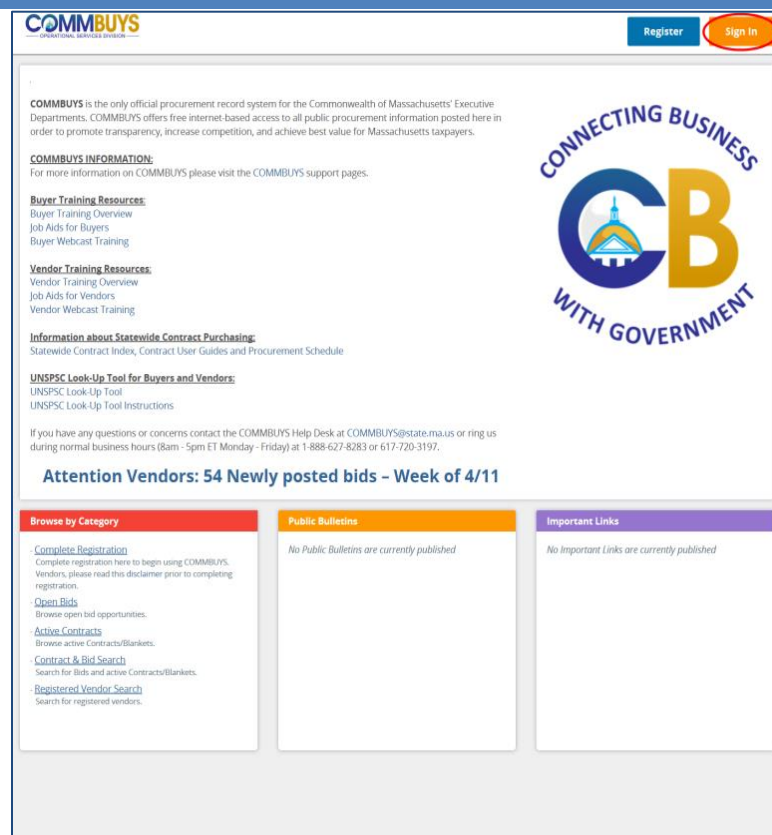
This Job Aid shows how to:

- Create a change order in COMMBUYS

Of Special Note:

A change order is a way of making changes or updating an approved purchase order (PO) including a Master Blanket Purchase Order (MBPO). Change orders are only allowed after a PO has completed its entire approval path. Only the COMMBUYS “purchaser”, listed on the document, or their Basic Purchaser (BP) supervisor and the Department Access (DA) super user can create a change order. All revisions to the PO are subject to the same approvals. Changes can be made to the items and accounting tabs. **NOTE:** Changes to a PO appear on the Summary page.

Screenshot



The screenshot shows the COMMBUYS website homepage. At the top right, there are 'Register' and 'Sign In' buttons. The main content area includes a welcome message, a 'CONNECTING BUSINESS WITH GOVERNMENT' logo, and several sections: 'COMMBUYS INFORMATION', 'Buyer Training Resources', 'Vendor Training Resources', 'Information about Statewide Contract Purchasing', and 'UNSPSC Look-Up Tool for Buyers and Vendors'. At the bottom, there are three columns: 'Browse by Category' (with links like Complete Registration, Open Bids, Active Contracts, Contract & Bid Search, and Registered Vendor Search), 'Public Bulletins' (stating no public bulletins are currently published), and 'Important Links' (stating no important links are currently published).

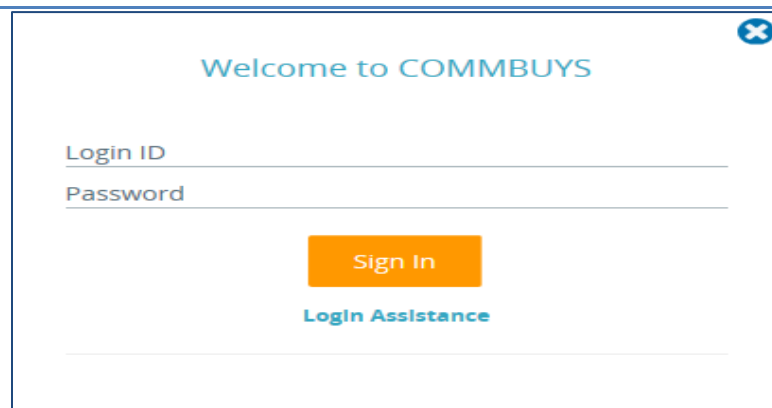
Directions

Step 1: Signing in to COMMBUYS

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](#).
2. Click on the orange **Sign In** button in the upper right hand corner.

Step 2: Logging In

Enter your Login ID and Password and click on the Sign In button.



The screenshot shows the COMMBUYS login page. It features a 'Welcome to COMMBUYS' message at the top. Below this, there are input fields for 'Login ID' and 'Password'. A large orange 'Sign In' button is centered below the input fields. At the bottom, there is a link for 'Login Assistance'.

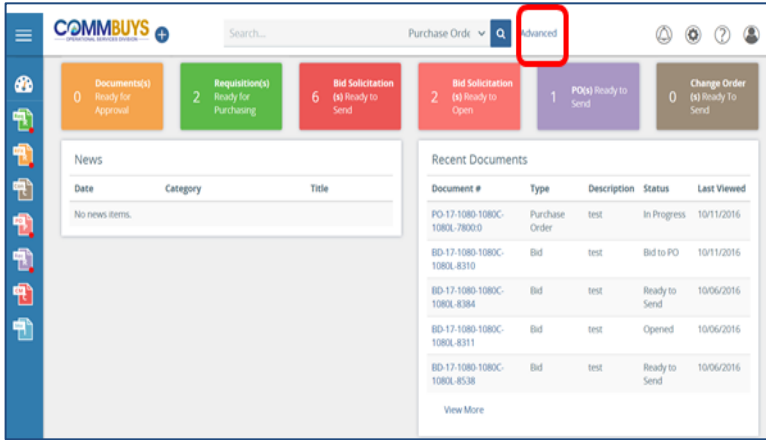
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Screenshot

Directions

Step 3: Clicking on the Advanced Search Hyperlink

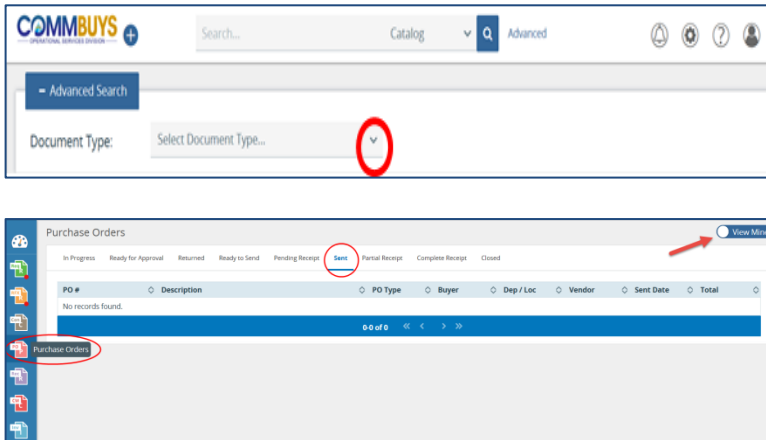
Upon successful login, click on the blue Advanced hyperlink next to the magnifying glass icon.



Step 4: Clicking on the Search Dropdown Arrow

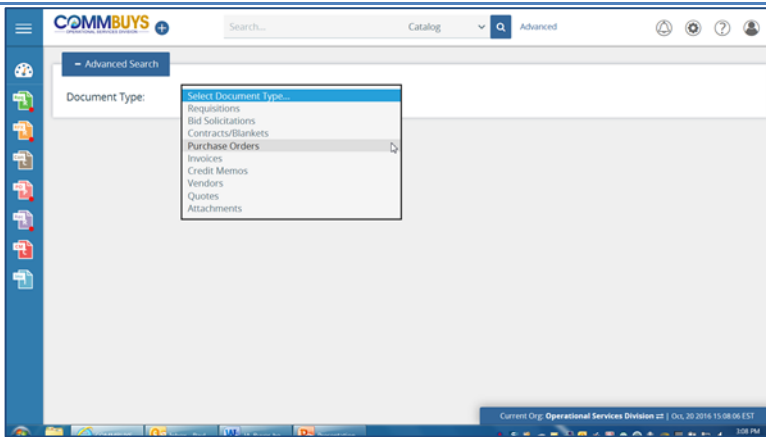
Click on the dropdown arrow next to the Select Document Type field.

NOTE: An alternative way to search for Purchaser Orders that you created is using the Icon Bar on the left side of the page. Your Purchase Orders can be found by clicking on the Pink Purchase Orders icon. You would then choose the status that you want along the top of your results page. It automatically defaults to "View Mine" in the upper right. If you use this alternate way, you can skip to step 7.



Step 5: Selecting a Document Type

From the dropdown menu, select the desired document type. For example, select **Purchase Order** for ordinary POs or select **Contract Blankets** for an MBPO.





OPERATIONAL SERVICES DIVISION

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Screenshot

Advanced Search

Document Type: **Purchase Orders** Match Criteria: **All**

Purchase Order # Purchase Order Release # Alternate ID

Description Purchase Order Type Select Purchase Order Type... Status Select Status...

Department Select Department... Location Select Location... Buyer Select Buyer...

Requestor Select Requestor... Vendor Name Type Code Select Type Code...

Item Description NIGP Class Select NIGP Class... NIGP Class Item Select NIGP Class Item...

Sent Date From Sent Date To

Search Clear

Directions

Step 6: Searching for a Document

The page refreshes to display the search fields. You can now enter search criteria to locate the PO that will require a change order.

Enter search criteria and click on the **Search** button.

OSD07-OSD07-7813-4	10/21/2016	Iron Pith/SBPO1Pilot	Operational Services Division	OSD07/OSD07	Zelpha Bennett	Conversion Vendor	\$70,000.00	3P5 - In Progress
PO-17-1080-OSD07-OSD07-7813-5	10/21/2016	SBPO1Pilot test	Operational Services Division	OSD07/OSD07	Zelpha Bennett	INNO4 LLC	\$50,000.00	3P5 - Sent
PO-17-1080-OSD07-OSD07-7798	10/05/2016	Small Scale IT Professional Services / IT Small Business Incubator Contract SBPO1	Operational Services Division	OSD07/OSD07	Zelpha Bennett	Conversion Vendor	\$0.00	3P5 - Sent
PO-17-1080-OSD07-OSD07-7798-1	10/05/2016	ZB Small Scale IT Professional Services / IT Small Business Incubator Contract SBPO1	Operational Services Division	OSD07/OSD07	Zelpha Bennett	Nantucket Technology	\$0.00	3P1 - In Progress
PO-17-1080-OSD07-OSD07-7763	09/15/2016	GRO30	Operational Services Division	OSD07/OSD07	Zelpha Bennett	US Foods	\$0.00	3P5 - Sent
PO-17-1080-OSD07-OSD07-7734	09/09/2016	Muni Construction via CB	Operational Services Division	OSD07/OSD07	Zelpha Bennett	CompuTrain	\$0.00	3P1 - In Progress
PO-17-1080-OSD07-OSD07-7715	09/07/2016	09.07.16_Test_M B	Operational Services Division	OSD07/OSD07	Zelpha Bennett	Susan Moore	\$0.00	3PCA - Canceled

Step 7: Selecting the Document

The search returns a list of purchase orders meeting the search criteria.

Click the blue hyperlinked PO number to open the desired document.

NOTE: a PO must be in 'Ready to Send' or 'Sent' status before a change order can be created against the PO. The status can be selected from the Header Major Status, if you want to filter your results.

Master Blanket Purchase Order PO-17-1080-OSD07-OSD07-7763 Status: 3P5 - Sent

General Items Vendor Routing Control Attachments(1) Notes(1) **Change Orders** Reminders Summary

Header Information

Purchase Order Number: PO-17-1080-OSD07-OSD07-7763 Release Number: 0 Short Description: GRO30, Quantity

Status: 3P5 - Sent Purchaser: Zelpha Bennett Receipt Method: Minor Status:

Fiscal Year: 2017 PO Type: Blanket

Organization: Operational Services Division Location: OSD07 - OSD TRACKING Type Code: Statewide Contract

Department: OSD07 - OSD TRACKING Entered Date: 09/15/2016 04:51:45 PM Control Code: 0.00%

Alternate ID: 0 Retainage %: 0.00%

Days ARO: 0 Release Type: Direct Release, 3PA Release Allowed

Print Dest Detail: If Different Tax Rate: Discout %: 0.00%

Catalog ID: Release Enabled: No

Contact Instructions: Purchase Order Print Actual Cost: \$0.00

Print Format: Solicitation Enabled: No

Special Instructions:

Step 8: Clicking on the Change Orders Tab

The PO opens to the **Summary** tab. Click on the **Change Orders** tab.

COMMbuys Search... Catalog Advanced

Master Blanket Purchase Order PO-17-1080-OSD07-OSD07-7763 Status: 3P5 - Sent

General Items Vendor Routing Control Attachments(1) Notes(1) **Change Orders** Reminders Summary

There are no change orders for this document.

Create Change Order

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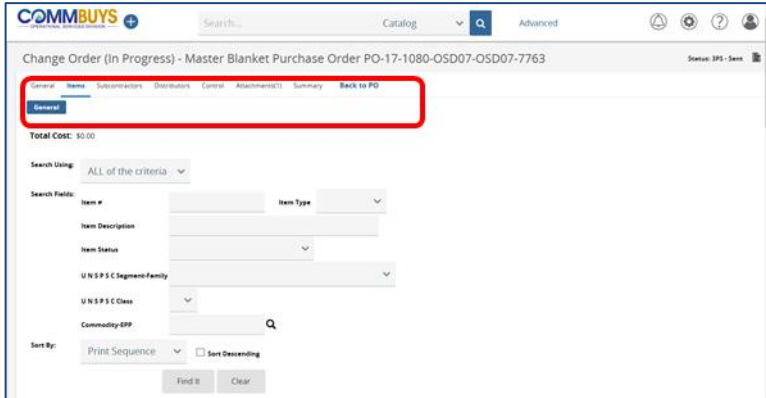
Step 9: Clicking on the Create Change Order Button

The **Change Order** tab displays.

Click on the **Create Change Order** button.

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Screenshot



Directions

Step 10: Selecting a Tab

The Change Order opens to the Items General tab. Changes may be made on several tabs including changes to the quantity, description, department, purchaser, contact, attachments, etc.

Step 11: Making Changes

1. Make the changes and click on the **Save & Continue** button. For this PO, the quantity on an item was changed.
2. Once all changes are complete, click on the **Summary** tab.

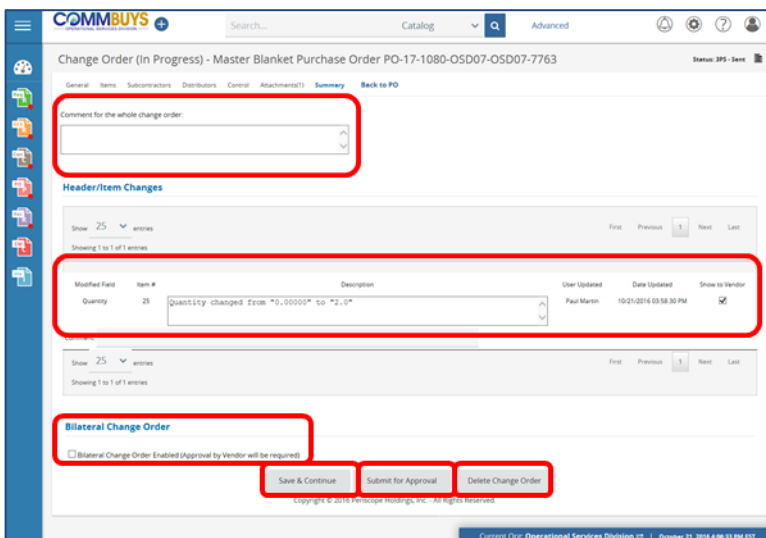
Step 12: Completing the Summary Tab

The **Summary** tab provides a recap of the changes made to the PO.

The top section of the screen allows you to enter a comment for the change order.

The Header/Item Changes section displays the modified field and a description of the item modification, when modified and by whom.

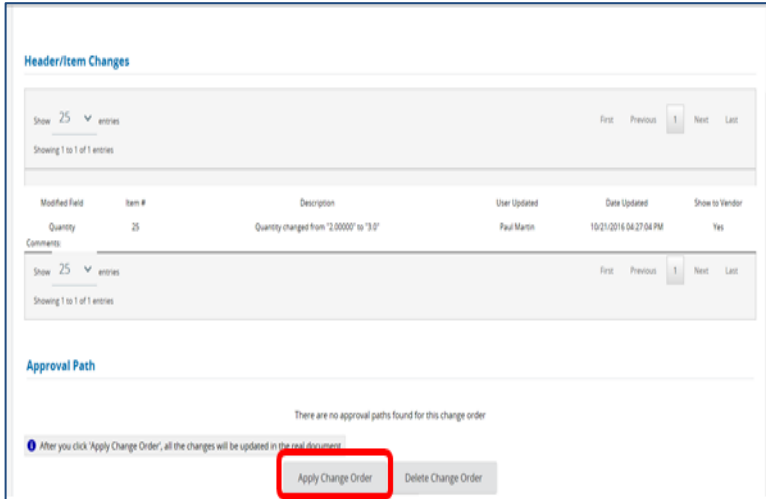
If you would like the Vendor to approve the change order, select the **Bilateral Change Order Enabled** checkbox at the bottom left of the screen.



- To confirm the changes, click on the **Save & Continue** button.
- To stop the change, click on the **Delete Change Order** button.
- Change Orders require approval. To submit the change for approval, click on the **Submit for Approval** button.
- The Summary tab redisplay confirming the change order is submitted for approval.

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Screenshot



Header/Item Changes

Show 25 entries
Showing 1 to 1 of 1 entries

Modified Field	Item #	Description	User Updated	Date Updated	Show to Vendor
Quantity	25	Quantity changed from '2.00000' to '3.0'	Paul Martin	10/21/2016 04:27:04 PM	Yes

Comments

Show 25 entries
Showing 1 to 1 of 1 entries

Approval Path

There are no approval paths found for this change order

After you click 'Apply Change Order', all the changes will be updated in the real document

Apply Change Order **Delete Change Order**

Directions

Step 13: Applying the Change Order

Just like all other COMMBUYS documents, a change order may require approval. Once the change order has been approved, it will be in a **Ready to Send** status.

Locate your Purchase Order and click on the Change Orders tab. Click on the **Apply/Delete Change Order** button at the bottom of the page. Then click on the **Apply Change Order** button at the bottom of the Summary tab.

When the screen redisplay, go to the bottom and click on the **Save & Continue** button.

The change order now is in a **Sent** status.